



## Memorandum

**To:** Anne Teresa, SFA  
Vicki Wilson, SFA

**From:** Howard Weitzner, Accenture

**Date:** November 30, 2001

**Subject:** Deliverable 29.4.1a Training Services Summary

### **Purpose**

This memo summarizes the results of Training Services provided to SFA University during the period October 1 – October 31, 2001. The results were delivered through supporting materials and working sessions with SFA University staff. The work effort addressed improvements to SFA University's training services, processes and systems.

### **Initiatives this Period**

Specific initiatives addressed during this period included:

- SFA University strategic planning and organization development
- Training development and delivery methodology/process team support
- Delivery Cost Assessment
- LMS Support
- Project management support

### **Planned Initiatives**

During the period November 1 – November 30, the following initiatives may be addressed, but not limited to:

- SFA University strategic planning and organization development
- Training development and delivery methodology/process team support
- Development of the Learning Consultant role and capabilities
- Manager development and performance support assistance
- LMS Support
- Delivery cost assessment

### **Description of Initiatives**

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*SFA University strategic planning and organization development*

A series of SFA University planning meetings have been conducted for all SFA managers. The purpose of these meetings was to review SFA University's strategic direction and chart the path for SFA University to become a full strategic partner within SFA. These working sessions focus on the prioritization of SFA University services, capability development, marketing SFA University and contingency planning. Outcomes from this effort include:

- Identification of action plans which document the focus of activities for SFAU to achieve its goal of becoming a strategic partner
- Mapping of SFAU staff to action plans
- Development of workplans, goals and roles for each action plan

Follow-up activities will include supporting each team to finalize their action plans and scope the work for each team. Additional support will be provided to each team as they begin work and complete major segments of work.

*Training development and delivery methodology/Process team support*

The Training Development and Delivery team supports the creation and implementation of best practices for how SFA University develops and delivers training. The methodology (Plan It, Design It, Build It, Do It, Assess It) follows a customized version of the ADDIE model (Analysis, Design, Develop, Implement, Evaluate). Currently, the team continues to create the detailed materials to support the training teams use of the methodology.

Specific activities during this past work period included:

- Refinement of the "Gantt" chart detailing the timing and coordination of tasks
- Development and refinement of templates, job aids and deliverables for the Plan It! Phase
- Begin development of the Design It! phase materials
- Working session with the Delivery Systems team to define the scope and approach for the its training
- Development of training materials for introducing the process to the training teams

The next phases of work will include:

- Development of team working sessions for the training effort, including an overview of the process and detailed use of the templates, job aids and deliverables
- Facilitation of team working sessions and on-going support of the training teams
- Completion of the Plan It! and Design It! phase deliverables

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*Delivery cost assessment*

An initial analysis of course information from SFA University's 1999 Annual Report on Training has identified opportunities to reduce the costs of delivering training either through alternative delivery channels or revisions to training contracts. Preliminary results were reviewed and the need was identified to conduct a quick delivery cost assessment of which courses to target for cost reduction. In conjunction with SFA University, this quick assessment will be updated based on FY 2000 training data as well as research into the existing gaps of current information. Low-cost solutions that are easy to implement ("quick hits") will be identified. Quick hits will include those courses with low content complexity, high volume of participants, frequent course sessions, low course fulfillment and the need for consistent content for all users. Specific activities in the next development period will include:

- Support for the Cost Analysis action plan
- Detailed research of the costs of one course and identification of the related process and tools
- Gather baseline data for all other courses
- Development of cost analysis model

*LMS Support*

During this period, the effort to secure funding for a Learning Management System (LMS) was completed. Initial planning for the implementation and revision of the business case also was conducted. During the next period of work, support will focus on updating the business case and completing the contractual requirements with vendors.

*Project Management Support*

Project management support continues to be provided to assist SFA University formalize the role of its project managers. This information identifies the role, tasks and tools an SFA University project manager will leverage to be successful. Additional information was provided on matrixed organizations and how they may be applied by SFA University should the organization deploy staff to multiple action teams.

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**Observations/Recommendations**

During the period October 1 – October 31, the following observations were identified and will be reviewed to determine the potential impact/value for SFA University:

- Deployment of personnel to multiple action teams may create a management challenge. Effective status reporting tools and processes are recommended to ensure that each team receives the support required for achieving its milestones on schedule.
- In an effort to secure its role as a strategic partner with both SFA and the Department, SFA University should identify which programs directly support recommendations on the Management Improvement (MIT) report.
- It would be beneficial to capture the services SFA University currently provides in a SFA University “blueprint” similar to the organization-wide blueprint. This will help SFA University communicate its role as a strategic partner within the organization as well as prioritize capability development projects. This effort has been incorporated under SFA University strategic planning and organization development described above.
- SFA University should explore its role as a service provider to the rest of the organization to provide a cohesive resource for the organization to improve its human performance potential. This effort has been incorporated under SFA University strategic planning and organization development described above.

**Attachments:**

- Action Plan materials
  - Action Plan template
  - Action Plan Matrix -- by plan
  - Action Plan Matrix – by person
- Progress matrix for the creation of training development and delivery methodology tools, templates, job aids and checklists.
- Training Process working session materials
  - Agenda
  - Session presentation
- Plan It! revised templates and job aids for the training development methodology
  - Training Needs Analysis
    - Audience Analysis
    - Performance Analysis
  - Curriculum Plan
    - Learning Objectives

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- Instructional Platform
- Project Plan
  - Stakeholder Analysis
  - Role Map
  - Work plan – Timeline and Check-in points
- Task Order
  - Task order format
- Matrix-based organization overview
- SFA reorganized process flow
- Assessment stages